



07 Program Year CAPER

GENERAL

GRANTEE: City of Bloomington, Indiana

CON PLAN PERIOD: 06/01/07 to 05/31/08

Executive Summary

The Executive Summary is not required. Provide a brief overview that includes major initiatives and highlights how activities undertaken during this program year addressed strategic plan objectives and areas of high priority identified in the consolidated plan.

PY 07 Action Plan Executive Summary:

Summary of Resources and Distribution of Funds

1) Summary of Resources and Distribution of Funds:

a. Provide a description of the resources made available

PY 07 CAPER #1a response:

b. Provide the investment of available resources

PY 07 CAPER #1b response:

c. Provide the geographic distribution and location of investments

PY 07 CAPER #1c response:

d. Provide the number of families and persons assisted (including the racial and ethnic status of persons assisted)

PY 07 CAPER #1d response:

e. Provide actions taken to affirmatively further fair housing

PY 07 CAPER #1e response:

f. Provide other actions indicated in the strategic plan and the action plan

PY 07 CAPER #1f response:

*You are encouraged to include maps in this description.
Specifying census tracts where expenditures were concentrated and the percentage of funds expended in NRSAs or local target areas may satisfy this requirement*

General CAPER Narratives:

2) Assessment of Three to Five Year Goals and Objectives

- a) Describe the accomplishments in attaining the goals and objectives for the reporting period.

Assessment of three-year goals and objectives:

Goal	Program/Agency	Amount Allocated	Amount Expended in FY 07/08 (may include previous year funds & program income)	# of Units of Service/ Housing Provided
Increase range of housing options & related services for persons w/ special needs.	Abilities Unlimited Home Modification for Accessible Living			
Improve the quality of affordable rental housing.	Bloomington Housing Authority –			
Increase quality and available of affordable housing.	HAND Emergency Home Repair			
Increase quality and availability of affordable housing.	Rockport Road Infrastructure Improvements			
Improve the services for low/mod income persons.	Middle Way House – Coca Cola Renovation			
Increase quality and availability	Habitat for Humanity-Lot			

of affordable housing.	acquisition			
Improve quality/increase quantity of neighborhood facilities for low-income persons.	Bloomington Parks and Recreation - Broadview Neighborhood Initiatives (Park)			
Improve quality/increase quantity of neighborhood facilities for low-income persons.	HAND – Curb and Sidewalk Program			
Increase quality and availability of affordable housing.	HAND – Engineering Services			
Improve quality/increase quantity of neighborhood facilities for low-income persons.	South Rogers Street Infrastructure Design			
Improve quality/increase quantity of neighborhood facilities for low-income persons.	Neighborhood Stormwater Projects			
Increase quality and availability of affordable housing.	Owner occupied rehabilitation.			
Increase quality and availability of affordable housing.	Down payment and closing costs assistance			
Improve the services for low/mod income persons.	Big Brothers/Big Sisters One-to-One Program			
Improve the services for low/mod income persons.	Community Kitchen of Monroe County Free Meals Program			
Improve the services for low/mod income persons.	Hoosier Hills Food Bank Food Bank Program			
Improve the services for	Shalom Center			

low/mod income persons.				
Improve the services for low/mod income persons.	Middle Way House Domestic Violence Emergency Shelter			
Improve the services for low/mod income persons.	Monroe County United Ministries Child Care Assistance			
Improve the services for low/mod income persons.	Mother Hubbard's Cupboard Food Pantry Program			
Increase the availability of affordable housing.	CHDO Set-aside			
Increase the availability of affordable housing.	Tenant Based Rental Assistance			
Improve the quality of owner housing.	HOME Owner-Occupied Rehab			
Increase the availability of affordable housing.	HOME Acquisition 2404 S. Bryan & 303 W. Coolidge			1 Housing unit was sold. Another one is ready to sell and another lot was created to build a new house
Increase the availability of affordable housing.	HOME Rockport Road (EverGreen Village)			
Increase the availability of affordable housing	Habitat for Humanity-construction on 3 lots			
Increase the availability of affordable housing.	Rental Housing-New Construction and Rehab	\$137,919		3 units have committed funding and expected to be completed in 2007 or 2008.
	Purchase Rehabilitation			

- b) Provide a breakdown of the CPD formula grant funds spent on grant activities for each goal and objective.

****If not using the CPMP Tool:** Use Table 2A, 2B, 3B, 1C, 2C, 3A*

****If using the CPMP Tool:** Use Needs Tables, Annual Housing Completion Goals, Summary of Specific Annual Objectives. **(Use of these tables is sufficient, additional narrative is not required.)***

- c) If applicable, explain why progress was not made towards meeting the goals and objectives.

PY 07 CAPER General Questions #2c response:

Progress was made toward meeting the goals and objectives.

3) Affirmatively Furthering Fair Housing

- a) Provide a summary of impediments to fair housing choice.

PY 07 CAPER General Questions # 3a response:

The city of Bloomington coordinates fair housing activities through its Human Rights Attorney, Barbara McKinney and the Bloomington Human Rights Commission (BHRC). The Bloomington Human Rights Ordinance, among other things, prohibits discrimination in housing on the basis of sex, race, religion, color, ancestry, sexual orientation, disability, gender identity, national origin or familial status. Very few housing discrimination complaints are filed, and * were filed during the time period of this report. However, staff endeavors to provide educational services on this issue to the community. Over the past year, from June, 1, 2007 through May 31, 2008, McKinney answered approximately * inquiries about housing issues from tenants, landlords, buyers and the general public. Questions covered a number of topics including accessible housing, familial status discrimination and sex discrimination. The goal is to attempt to resolve the problem without having to conduct formal investigation. Ms. McKinney also answers questions from sources outside the city limits.

HAND continues to provide multiple venues for “R-101 Renting in Bloomington” class as a service to other agencies like the Public Housing Authority and Martha’s House. In 2006 The HAND department in partnership with McKinney, initiated a study to identify weaknesses in the provision of housing information to the Hispanic community. The study and resulting plan tracked how information is ordinarily provided to clients with limited English. The LEP (Limited English Proficiency) Plan, was adopted in June of 2007 and demonstrates a number of suggested changes in policy, increased training and verification of language assistance contacts within the community. (Note: Does this include using the language line? How many times have we used the language line?)

The BHRC continues to publish a monthly newsletter, Rights Stuff, which frequently addresses fair housing within its coverage of new developments in civil rights.

McKinney provides and distributes HUD fair housing brochures at many different venues throughout the year. The fair housing brochure is on the City's web site and it is also available in Spanish.

The city of Bloomington has completed a review and revision of its regulatory impediments to affordable housing. This occurred as a topic of discussion during the comprehensive planning process conducted by the Planning Department. In February of 2007 Bloomington adopted its Unified Development Ordinance (UDO). This document is the culmination of an inclusive public discussion process that started over 8 years ago with the Growth Policy Plan (GPP). Out of these extensive conversations, came a multi-faceted approach to encourage the development and sustainability of affordable housing in Bloomington. This is articulated in Section 20.05.009 AH-01 Affordable Housing Standards in the UDO. (Note: Check with Planning on changes to the UDO.)

One strategy is to reduce the development cost of housing by providing waivers to development standards for affordable housing construction. Instead of requiring variances and public hearings, a developer can automatically anticipate reduced standards for an affordable housing project:

- Required on site parking is automatically reduced to one space per dwelling unit when offsite parking is available
- Minimum lot area requirements may be reduced by 40%
- Minimum lot width may be reduced by 20%
- Side building setbacks may be reduced to 5 feet regardless of the number of stories
- Rear setbacks may be reduced to 15 feet

Another strategy targets development fees. The city endorsed an interdepartmental policy of waiving fees when they are associated with affordable housing construction:

- Fees for the BZA and Plan Commission
- BPW excavation of right-of-way permits
- Utility Service Board sewer hook-on fees.
- Within the UDO the City has stated a policy of supporting affordable housing by bearing the cost of sidewalks and street trees where deemed appropriate by the directors of Planning and Public Works.

Bloomington has long supported infill strategies that maximize the use of existing infrastructure and social services. On several occasions over the last 5 years, the Planning and Housing and Neighborhood Development Departments have cooperated on land development issues near downtown. These projects resulted in affordable subsidized housing designed to be compatible with the existing residential character. From the Policy 3 of the GPP: "...Develop a program that provides incentives (i.e. tax abatements or purchase/rehab assistance) for rehabilitating older housing stock in established neighborhoods for affordable housing." As an example, a 4 lot tract was purchased by the city, which subdivided one of the existing lots. The city then conveyed the 5 lots to three affordable housing developers. In this case one house was moved to the site, five were new construction, compatible in scale and design to the

existing neighborhood. (Note: We should probably add some stuff about the in-fill we did on 14th Street.)

Affordable housing projects participating in a program administered by the local, state or federal government must comply with the income eligibility requirements for the required time period for that program. The new zoning ordinance ensures parity of location, design, quality and proximity to amenities within any market rate development.

Obstacles outlined in the Consolidated Plan 2005-2010 include access to affordable housing units and accessible affordable housing units, increase cost of developing/rehabilitating affordable housing units, risk of exposure to lead based paint, perceived impediments to participating in HAND programs, and fair housing issues. HAND has attempted to address these obstacles and needs by providing funding to help develop and/or rehabilitate * housing units this year and address the ever increasing cost of development/rehabilitation by increasing funds available for these projects. HAND has assisted * households in minimizing or eliminating their risk of exposure to lead based paint since 2001 and continues to work with the local Monroe County Lead-Safe Coalition and the Indiana State Department of Health to help develop policies and procedures to eliminate the risk of exposure to lead based paint for Indiana's children.

HAND continues in its efforts to lower the perceived barriers to participating in HAND programs by providing neighborhood services such as neighborhood grants (general fund) and informational/technical assistance. HAND, along with the City Planning Department, helps neighborhoods complete comprehensive neighborhood plans. To date, McDoel Gardens, Broadview, Prospect Hill and Green Acres neighborhoods have all completed plans. The first three neighborhoods are in HAND target areas. This neighborhood planning process allows the neighbors to meet HAND staff members in a positive manner and helps them develop the direction of their neighborhood. HAND staff members also attend neighborhood association meetings, teach classes to groups such as the Bloomington Housing Authority's Family Self-Sufficiency Groups, and provides information to organizations such as the Bloomington Board of Realtors. All of these efforts are to help educate the citizens of Bloomington about HAND services and lower any perceived barriers to approaching HAND for assistance.

- b) Identify actions taken to overcome effects of impediments identified in the jurisdiction's Analysis of Impediments.

PY 07 CAPER General Questions # 3b response:

4) Address Obstacles to Meeting Underserved Needs

Identify actions taken to address obstacles to meeting underserved needs.

PY 07 CAPER General Questions # 4 response:

5) Foster and Maintain Affordable Housing

Identify actions taken to foster and maintain affordable housing.

PY 07 CAPER General Questions # 5 response:

6) Leveraging Resources

- a) Identify progress in obtaining "other" public and private resources to address needs.

PY 07 CAPER General Questions # 6a response:

- a. In Fiscal Year 07, HAND received funding from the following sources to provide housing assistance:
- i. HUD Housing Counseling SuperNOFA -- \$36,503 for counseling services which helped leverage \$* in private sources and other City funds;
- b) Describe how Federal resources from HUD leveraged other public and private resources.

PY 07 CAPER General Questions # 6b response:

HAND used its HOME and CDBG dollars allocated to housing projects to leverage funds for the continuation of the IHFA (IHCD) planning/construction loan/grant. HAND also used its federal dollars, along with private sources and City general fund dollars to leverage funds for its housing counseling grant. HAND used the housing counseling grant funds to leverage the funds from the Monroe County Community Foundation for the revolving loan fund. HAND continues to explore other options to help them provide services to the Bloomington community.

- c) Describe how matching requirements were satisfied.

PY 07 CAPER General Questions # 6c response:

Matching requirements:

Address	Type	Amount
211 N. Rogers	Cash	\$50,000.00
211 N. Rogers	Forgone Taxes, Fees, Charges	\$52,095.61
701 W. 11 th Street	Forgone Taxes, Fees, Charges	\$2,000.00
2110 S. Rockport	Forgone Taxes, Fees, Charges	\$84.00

1633 W. 8 th Street	Forgone Taxes, Fees, Charges	\$55.00
1100 W. 10 th Street	Cash	\$4,463.57
3141 Kingsley Drive	Forgone Taxes, Fees, Charges	\$52.00
709 W. 11 th Street	Forgone Taxes, Fees, Charges	\$2,000.00
1026 W. 14 th Street	Appraised Land/Real Property	\$14,000.00
1018 W. 14 th Street	Appraised Land/Real Property	\$14,000.00
1010 W. 14 th Street	Appraised Land/Real Property	\$14,000.00
1026 W. 14 th Street	Cash	\$50,000.00
1018 W. 14 th Street	Cash	\$50,000.00
1010 W. 14 th Street	Cash	\$50,000.00
1010 W. Cottage Grove	Cash	\$31,895.75
1014 W. Cottage Grove	Cash	\$31,895.75
2336 S. Peoples Court	Cash	\$29,730.64
1030 Countryside	Cash	\$29,730.64
2343 S. Terra Court	Cash	\$29,730.64
1100 Countryside	Cash	\$29,730.64
2333 Zona Court	Cash	\$29,730.64
Total		\$515,194.88

7) Citizen Participation

a) Provide a summary of citizen comments.

*Please note that Citizen Comments and Responses may be included as additional files within the CPMP Tool.

PY 07 CAPER Citizen Participation # 7a response:

The Comprehensive Annual Performance Evaluation Report was posted on the City's web site on July 23rd. It was also made available at the Monroe County Public Library's Indiana Room and the City of Bloomington Housing and Neighborhood Development office and its availability was advertised in the Herald-Times on July 23, 2008 for public comment. The public heavily participates in the CDBG allocation process and provides on-going comments/suggestions through the Department's e-mail and the public meetings attended by HAND staff members.

Comments Received:

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The City of Bloomington uses a Citizen Advisory Council (CAC) for distribution of its CDBG funds. For this program year, the calendar of meetings was as follows:

September 6, 2006	Application release date
September 6, 2006	Informational meeting for interested applicants

October 6, 2006	Letters of Intent due
October 12 or October 17, 2006	Mandatory applicant training
November 13, 2006	Citizen Advisory Council organizational meeting and training on National Objectives and goals
Prior to December 9, 2006	Citizen Advisory Council site visits to proposed projects
December 1, 2006	Applications due
December 11, 2006	Citizen Advisory Council meeting to pick up applications and review scoring criteria
January 4, 2007	Public Hearing for Physical Improvement Projects in the Council Chambers
January 11, 2007	Public Hearing for Social Service applicants in the Council Chambers
January 10, 2007	Allocations meeting for Physical Improvements
January 18, 2007	Allocations meeting for Social Services
February 5, 2007	Public Meeting – allocation recommendations presented to the Redevelopment Commission
February 28, 2007	Public Meeting – allocation recommendations presented to the City Council
March 7, 2007	Public Meeting – final approval of allocations by City Council

The Public Hearings held for each group allows the applicants to make a small presentation and answer questions. These hearings are held in the City Council Chambers where the public is welcome to attend or they can be viewed on Cable Access Television (CATS). The presentation of the allocations to the Redevelopment Commission is a public meeting, but it is not broadcasted on CATS; however the City Council meetings are broadcasted on CATS.

- b) Describe how consideration was given to comments or views of citizens, received in writing or orally at public hearings, in preparing the CAPER.

PY 07 CAPER Citizen Participation # 7b response:

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8) Institutional Structure

Describe actions taken during the last year to overcome gaps in institutional structures and enhance coordination.

PY 07 CAPER Institutional Structure # 8 response:

The staff of the Housing and Neighborhood Department administers federally funded projects and ensures compliance with the goals of the Consolidated Plan. HAND's 19 employees direct a variety of tasks associated with CDBG and HOME. Seven staff members have primary administration of these federal grants and are located in the housing division. Many of them have extensive experience in federally funded projects and programming. Two HAND staff members received their HOME certification in March 2006. HAND also has four certified housing counselors; two of which are also certified in

Reverse Mortgage Counseling. The State of Indiana recently adopted its own housing counseling certification process and all four are certified for pre-homeownership and two are certified for default. The City of Bloomington is a Certified Local Government for historic and the historic preservation program is administered from the HAND Department. The program manager for historic preservation is a certified planner (AICP) and received training in environmental review. We currently have four Lead Risk Assessors and one Lead Supervisor on staff. Five staff members have received their ICC property maintenance code certification. For legal expertise, we have access to excellent attorneys such as Ms. McKinney who administers the city's Human Rights Division.

The department also works with 6 Boards and Commissions, many of which have the ability to provide support to federal projects (BUEA, Housing Trust Fund, Redevelopment Commission, Historic Preservation Commission) or are related to the public process which distributes the funding (Citizen's Advisory Council) which grants us access to local community resources in order to provide better service to our citizens. In 2007, HAND continued to send a staff member to all Housing Network meetings in order to better coordinate the findings in the Continuum of Care application and to monitor the goals of Bloomington housing providers.

HANDS's Outreach to advertise service programs included the following:

- o A press conference with then Congressman Sodrel to discuss the need of affordable housing and advertise four homes built using HUD funds;
- o Radio appears by HAND director on WB97 to discuss HAND programs;
- o Guest speaker at Bloomington Chamber of Commerce Chamber Chats on EverGreen Village, HAND's affordable LEED certified project (on-going);
- o Guest speaker on Olá Bloomington, a radio show on WFHB for Bloomington's Spanish speaking citizens on HAND programs;
- o Hosted a seminar for Bloomington neighborhoods called "Home to Get a Helping HAND" to advertise HAND programs;
- o Two radio spots were developed to be broadcast during a locally produced minority radio program; and
- o Continues to provide informational brochures about its Purchase Rehab, Rental Rehab, Owner Occupied Rehab, HMAL and Homebuyers Club programs at all of its events.

Weekly, HAND sends a staff member to meet with both chronically homeless and homeless persons at the Shalom Center, which primarily provides emergency meals. She identifies appropriate housing, and refers to local shelters. She helps fill out housing applications to the Housing Authority or Martha's House emergency shelter, including declarations of homelessness which may increase their opportunities to find housing. The Shalom Community Center also hosts the services of the Social Services Administration, Martha's House, Planned Parenthood, Head Start, Ivy Tech Community College, Job Links, Monroe County Health Department, Indiana Legal Services, and the St. Vincent DePaul Society. The center provides personnel to assist with job searches and training on a daily basis. Six of these services are provided weekly. The Center has become a clearinghouse for needed services within the homeless community, and a first contact for many agencies that provide the most basic housing needs. Shalom Center is

partially funded by CDBG and Jack Hopkins grants, which are drawn from general fund money from the City of Bloomington. The Jack Hopkins Fund, disbursed through Common Council, has been an invaluable resource for operating funds for local social service agencies. During the CDBG round, \$128,615 was shared among 7 agencies. Jack Hopkins added another \$135,411 for social service programming which was divided up among 23 agencies.

9) Monitoring

- a) Describe actions taken to monitor the jurisdiction's performance in meeting objectives and outcomes set forth in its strategic plan.

PY 07 CAPER Monitoring # 9a response:

- b) Describe how and the frequency with which you monitored your activities, including subrecipients (including sponsors or administering agents).

PY 07 CAPER Monitoring # 9b response:

- c) Describe the results of your monitoring including any improvements made as a result.

PY 07 CAPER Monitoring # 9c response:

- d) Describe actions taken to insure compliance with program requirements, including requirements involving the timeliness of expenditures.

PY 07 CAPER Monitoring # 9d response:

- e) Describe steps/actions taken to ensure long-term compliance with housing codes, including any actions or on-site inspections undertaken during the program year.

PY 07 CAPER Monitoring # 9e response:

- f) What is the status of your grant programs?
i) Are any activities or strategies falling behind schedule?
ii) Are grant disbursements timely?
iii) Do actual expenditures differ from letter of credit disbursements?

PY 07 CAPER Monitoring # 9f response:

10) Antipoverty Strategy

Describe actions taken during the last year to reduce the number of persons living below the poverty level.

PY 07 CAPER Antipoverty Strategy #10 response:

Self-Evaluation

- 11) Provide an evaluation of accomplishments. This evaluation must include a comparison of the proposed versus actual outcomes of each outcome measure submitted with the strategic plan and explain, if applicable, why progress was not made toward meeting goals and objectives.

****If not using the CPMP Tool: Use Table 1C, 2C, 3A***

****If using the CPMP Tool: Use Summary of Specific Annual Objectives.***

(The following IDIS Reports will be reviewed to determine satisfaction of this requirement: PR03, PR06, PR23, PR80, PR81, PR82, PR83, PR84, PR85)

Consider the following when providing this self-evaluation:

- a) Describe the effect programs had in solving neighborhood and community problems.
- b) Describe the progress made in meeting priority needs and specific objectives.
- c) Describe how activities and strategies made an impact on identified needs.
- d) Identify indicators that best describe the results of activities during the reporting period.
- e) Identify barriers that had a negative impact on fulfilling the strategic and overall vision.

- 12) Identify whether major goals are on target and discuss reasons for those that are not on target.

- 13) Identify any adjustments or improvements to strategies and activities that might meet your needs more effectively.

PY 07 CAPER Self-Evaluation # 11, 12, 13 response:

HOUSING

Affordable Housing

- 14) Evaluate progress in meeting its specific affordable housing objectives, including:

- a) Comparison of proposed numeric goals (from the strategic plan and annual plan) with the actual number of extremely low-income, low-income, and moderate-income renter and owner households assisted during the reporting period.

****If not using the CPMP Tool: Use Table 2A, 3B, 2B, 1C, 2C, 3A)***

****If using the CPMP Tool: Use Need/Housings, Needs/Community Development, Annual Housing Completion Goals, Summary of Specific Annual Objectives.***

PY 07 CAPER Affordable Housing # 14a response:

- b) Report the number of households served meeting the Section 215 requirements of affordable housing (essentially meeting the definitions in 24 CFR 92.252 and 92.254 for renters and owners, respectively).

**If not using the CPMP Tool: Use Table 3A*

**If using the CPMP Tool: Annual Housing Completion Goals
(Use of this table is sufficient no additional narrative is required)*

- c) Describe efforts to address worst case needs (defined as low-income renters with severe cost burden, in substandard housing, or involuntarily displaced).

PY 07 CAPER Affordable Housing # 14c response:

- d) Description of efforts to address the accessibility needs of persons with disabilities.

PY 07 CAPER Affordable Housing # 14d response:

Public Housing Strategy

- 15) Describe actions taken during the last year to improve public housing and resident initiatives.

PY 07 CAPER Public Housing #15 response:

Barriers to Affordable Housing

- 16) Describe actions taken during the last year to eliminate barriers to affordable housing.

PY 07 CAPER Barriers to Affordable Housing #16 response:

Lead-based Paint

- 17) Describe actions taken during the last year to evaluate and reduce lead-based paint hazards.

PY 07 CAPER Lead-based Paint #17 response:

HOMELESS

Homeless Needs

- 18) Identify actions taken to address needs of homeless persons.

PY 07 CAPER Homeless Needs #18 response:

- 19) Identify actions to help homeless persons make the transition to permanent housing and independent living.

PY 07 CAPER Homeless Need #19 response:

- 20) Identify actions taken to implement a continuum of care strategy for the homeless and new Federal resources obtained during the program year, including from the Homeless SuperNOFA.

****If not using the CPMP Tool:** Use Table 3B, 1C*

****If using the CPMP Tool:** Use Needs/Homeless, Needs/Non-Homeless, Annual Housing Completion Goals, Summary of Specific Annual Objectives.*

PY 07 CAPER Homeless Needs #20 response:

Specific Homeless Prevention Elements

- 21) Identify actions taken to prevent homelessness.

PY 07 CAPER Specific Homeless Prevention #21 response:

- 22) Identify actions to address emergency shelter and transitional housing needs of homeless individuals and families (including significant subpopulations such as those living on the streets).

PY 07 CAPER ESG # 22 response:

Emergency Shelter Grants (ESG)

- 23) Assessment of Relationship of ESG Funds to Goals and Objectives
- a) Evaluate progress made in using ESG funds to address homeless and homeless prevention needs, goals, and specific objectives established in the Consolidated Plan.

****If not using the CPMP Tool:** Use Table 2A, 3B, 2B, 1C, 2C, 3A)*

****If using the CPMP Tool:** Use Need/Housings, Needs/Community Development, Annual Housing Completion Goals, Summary of Specific Annual Objectives.*

PY 07 CAPER ESG Evaluate Progress # 23a response:

- b) Detail how ESG projects are related to implementation of comprehensive homeless planning strategy, including the number and types of individuals and persons in households served with ESG funds.

PY 07 CAPER ESG # 23b response:

24) Matching Resources

- a) Provide specific sources and amounts of new funding used to meet match as required by 42 USC 11375(a)(1), including cash resources, grants, and staff salaries, as well as in-kind contributions such as the value of a building or lease, donated materials, or volunteer time.

PY 07 CAPER ESG # 24 response:

25) State Method of Distribution

- a) States must describe their method of distribution and how it rated and selected its local government agencies and private nonprofit organizations acting as subrecipients.

PY 07 CAPER ESG # 25 response:

26) Activity and Beneficiary Data

- a) Completion of attached Emergency Shelter Grant Program Performance Chart or other reports showing ESG expenditures by type of activity. Also describe any problems in collecting, reporting, and evaluating the reliability of this information.

PY 07 CAPER ESG # 26a response:

- b) Homeless Discharge Coordination

- i) As part of the government developing and implementing a homeless discharge coordination policy, ESG homeless prevention funds may be used to assist very-low income individuals and families at risk of becoming homeless after being released from publicly funded institutions such as health care facilities, foster care or other youth facilities, or corrections institutions or programs.
 - ii) Explain how your government is instituting a homeless discharge coordination policy, and how ESG homeless prevention funds are being used in this effort.

PY 07 CAPER ESG # 26b response:

NON-HOMELESS SPECIAL NEEDS

Non-homeless Special Needs

*Refer to the Non-homeless Special Needs Table in the Needs.xls workbook or Table 1C.

- 27) Identify actions taken to address special needs of persons that are not homeless but require supportive housing, (including persons with HIV/AIDS and their families).

PY 07 CAPER Non-homeless Special Needs #26 response:

COMMUNITY DEVELOPMENT

Community Development Block Grant

28) Assessment of Relationship of CDBG Funds to Goals and Objectives

- a) Assess use of CDBG funds in relation to the priorities, needs, goals, and specific objectives in the Consolidated Plan, particularly the highest priority activities.

****If not using the CPMP Tool:** Use Table 2A, 3B, 2B, 1C, 2C, 3A)*

****If using the CPMP Tool:** Use Need/Housings, Needs/Community Development, Annual Housing Completion Goals, Summary of Specific Annual Objectives.*

PY 07 CAPER CDBG Assessment # 28a response:

- b) Evaluate progress made toward meeting goals for providing affordable housing using CDBG funds, including the number and types of households served.

****If not using the CPMP Tool:** Use Table 2A, 3B, 2B, 1C, 2C, 3A)*

****If using the CPMP Tool:** Use Need/Housings, Needs/Community Development, Annual Housing Completion Goals, Summary of Specific Annual Objectives.*

PY 07 CAPER CDBG Progress Evaluation # 28b response:

- c) Indicate the extent to which CDBG funds were used for activities that benefited extremely low-income, low-income, and moderate-income persons served by each activity where information on income by family size is required to determine the eligibility of the activity?

PY 07 CAPER CDBG LMI Benefit # 28c response:

29) Changes in Program Objectives

- a) Identify the nature of and the reasons for any changes in program objectives and how the jurisdiction would change its program as a result of its experiences.

PY 07 CAPER CDBG #29 response:

30) Assessment of Efforts in Carrying Out Planned Actions

- a) Indicate how grantee pursued all resources indicated in the Consolidated Plan.
- b) Indicate how grantee provided certifications of consistency in a fair and impartial manner.
- c) Indicate how grantee did not hinder Consolidated Plan implementation by action or willful inaction.

PY 07 CAPER CDBG # 30 response:

31) For Funds Not Used for National Objectives

- a) Indicate how use of CDBG funds did not meet national objectives.
- b) Indicate how use of CDBG funds did not comply with overall benefit certification.

PY 07 CAPER CDBG #31 response:

32) Anti-displacement and Relocation – for activities that involve acquisition, rehabilitation or demolition of occupied real property

- a) Describe steps actually taken to minimize the amount of displacement resulting from the CDBG-assisted activities.

PY 07 CAPER CDBG # 32a response:

- b) Describe steps taken to identify households, businesses, farms or nonprofit organizations that occupied properties subject to the Uniform Relocation Act or Section 104(d) of the Housing and Community Development Act of 1974, as amended, and whether or not they were displaced, and the nature of their needs and preferences.

PY 07 CAPER CDBG # 32b response:

- c) Describe steps taken to ensure the timely issuance of information notices to displaced households, businesses, farms, or nonprofit organizations.

PY 07 CAPER CDBG # 32c response:

33) Low/Mod Job Activities – for economic development activities undertaken where jobs were made available but not taken by low- or moderate-income persons

- a) Describe actions taken by grantee and businesses to ensure first consideration was or will be given to low/mod persons.

PY 07 CAPER CDBG # 33a response:

- b) List by job title of all the permanent jobs created/retained and those that were made available to low/mod persons.

PY 07 CAPER CDBG # 33b response:

- c) If any of jobs claimed as being available to low/mod persons require special skill, work experience, or education, provide a description of steps being taken or that will be taken to provide such skills, experience, or education.

PY 07 CAPER CDBG # 33c response:

- 34) Low/Mod Limited Clientele Activities – for activities not falling within one of the categories of presumed limited clientele low and moderate income benefit
- a) Describe how the nature, location, or other information demonstrates the activities benefit a limited clientele at least 51% of who are low- and moderate-income.

PY 07 CAPER CDBG # 34a response:

- 35) Program income received
- a) Detail the amount repaid on each float-funded activity.

PY 07 CAPER CDBG # 35a response:

- b) Detail all other loan repayments broken down by the categories of housing rehabilitation, economic development, or other.

PY 07 CAPER CDBG # 35b response:

- c) Detail the amount of income received from the sale of property by parcel.

PY 07 CAPER CDBG # 35c response:

- 36) Prior period adjustments – where reimbursement was made this reporting period for expenditures (made in previous reporting periods) that have been disallowed, provide the following information:

- a) The activity name and number as shown in IDIS;

PY 07 CAPER CDBG # 36a response:

- b) The program year(s) in which the expenditure(s) for the disallowed activity (ies) was reported;

PY 07 CAPER CDBG # 36b response:

- c) The amount returned to line-of-credit or program account; and

PY 07 CAPER CDBG # 36c response:

- d) Total amount to be reimbursed and the time period over which the reimbursement is to be made, if the reimbursement is made with multi-year payments.

PY 07 CAPER CDBG # 36d response:

- 37) Loans and other receivables

- a) List the principal balance for each float-funded activity outstanding as of the end of the reporting period and the date(s) by which the funds are expected to be received.

PY 07 CAPER CDBG #37a response:

- b) List the total number of other loans outstanding and the principal balance owed as of the end of the reporting period.

PY 07 CAPER CDBG #37b response:

- c) List separately the total number of outstanding loans that are deferred or forgivable, the principal balance owed as of the end of the reporting period, and the terms of the deferral or forgiveness.

PY 07 CAPER CDBG #37c response:

- d) Detail the total number and amount of loans made with CDBG funds that have gone into default and for which the balance was forgiven or written off during the reporting period.

PY 07 CAPER CDBG #37d response:

- e) Provide a List of the parcels of property owned by the grantee or its subrecipients that have been acquired or improved using CDBG funds and that are available for sale as of the end of the reporting period.

PY 07 CAPER CDBG #37e response:

38) Lump sum agreements

- a) Provide the name of the financial institution.

PY 07 CAPER CDBG #38a response:

- b) Provide the date the funds were deposited.

PY 07 CAPER CDBG #38b response:

- c) Provide the date the use of funds commenced.

PY 07 CAPER CDBG #38c response:

- d) Provide the percentage of funds disbursed within 180 days of deposit in the institution.

PY 07 CAPER CDBG #38d response:

NEIGHBORHOOD REVITALIZATION STRATEGY AREA (NRSA)

39) Jurisdictions with HUD-approved neighborhood revitalization strategy must describe progress against benchmarks for the program year.

PY 07 CAPER NRSA # 38 response:

HOME/ADDI

HOME/ American Dream Down Payment Initiative (ADDI)

☐ **NA**

40) Assessment of Relationship of HOME Funds to Goals and Objectives

- a) Assess the use of HOME funds in relation to the priorities, needs, goals, and specific objectives in the strategic plan, particularly the highest priority activities.

****If not using the CPMP Tool:** Use Table 2A, 3B, 2B, 1C, 2C, 3A)*

****If using the CPMP Tool:** Use Need/Housings, Needs/Community Development, Annual Housing Completion Goals, Summary of Specific Annual Objectives.*

PY 07 CAPER HOME Assessment # 40a response:

- b) Evaluate progress made toward meeting goals for providing affordable housing using HOME funds, including the number and types of households served.

****If not using the CPMP Tool:** Use Table 2A, 3B, 2B, 1C, 2C, 3A)*

****If using the CPMP Tool:** Use Need/Housings, Needs/Community Development, Annual Housing Completion Goals, Summary of Specific Annual Objectives.*

PY 07 CAPER HOME Progress Evaluation # 40b response:

- c) Indicate the extent to which HOME funds were used for activities that benefited extremely low-income, low-income, and moderate-income persons.

PY 07 CAPER HOME # 40c response:

41) HOME Match Report

- a) Use HOME Match Report HUD-40107-A to report on match contributions for the period covered by the Consolidated Plan program year.

PY 07 CAPER HOME Rental # 41 response:

- 42) HOME MBE and WBE Report, Use Part III of HUD Form 40107 to report contracts and subcontracts with Minority Business Enterprises (MBEs) and Women's Business Enterprises (WBEs).

PY 07 CAPER HOME Rental # 42 response:

- 43) Assessments

- a) Detail results of on-site inspections of rental housing.

PY 07 CAPER HOME Rental # 43a response:

- b) Describe the HOME jurisdiction's affirmative marketing actions.

PY 07 CAPER HOME # 43b response:

- c) Describe outreach to minority and women owned businesses.

PY 07 CAPER HOME/ADDI # 43c response:

HOPWA

Specific HOPWA Objectives

- 44) Assessment of Relationship of HOPWA Funds to Goals and Objectives.

- a) Assess the use of HOPWA funds in relation to the priorities, needs, goals, and specific objectives in the strategic plan, particularly the highest priority activities.

****If not using the CPMP Tool:*** Use Table 2A, 1C, 2C, 3A)

****If using the CPMP Tool:*** Use Need/Housings, Summary of Specific Annual Objectives.

PY 07 CAPER Specific HOPWA Objectives # 44a response:

- b) Evaluate progress made towards meeting the goals of providing affordable housing using HOPWA funds, including the number and types of households served.

****If not using the CPMP Tool:*** Use Table 2A, 1C, 2C, 3A)

****If using the CPMP Tool:*** Use Need/Housings, Summary of Specific Annual Objectives.

PY 07 CAPER Specific HOPWA Objectives # 44b response:

To report progress under the general and HOPWA specific requirements, the grantee may integrate the HOPWA elements in their standard CAPER report or establish a HOPWA-specific narrative by completing the following information. IDIS Report PR80 has useful financial and accomplishments information for end of year reporting.

HOPWA EXECUTIVE SUMMARY

- 45) Provide an executive summary (1-3 pages) and a specific objectives narrative which address the following:
- a) Grantee and Community Overview.
 - i) A brief description of the grant organization, the area of service, the name of the program contact(s), and a broad overview of the range/type of housing activities, along with information on each sponsor by name, main project site by zip code and related organization information.
 - b) Annual Performance under the Action Plan
 - i) Report on the actions taken during the year that addressed the special needs of persons who are not homeless but require supportive housing, and assistance for persons who are homeless.
 - ii) Evaluate the progress in meeting the project's objectives for providing affordable housing, including a comparison of actual outputs and outcomes to proposed goals and progress made on the other planned actions indicated in the strategic and action plans. The evaluation can address any related program adjustments or future plans.
 - iii) Include any assessment of client outcomes for achieving housing stability, reduced risks of homelessness and improved access to care.
 - iv) Report on the use of committed leveraging from other public and private resources that helped to address needs identified in the plan. Report the number of stewardship units of housing which have been created through acquisition, rehabilitation or new construction with any HOPWA funds.
 - v) Describe any other accomplishments recognized in the community due to the use of HOPWA funds, including any projects in developmental stages that are not operational.
 - vi) Provide an analysis of the extent to which HOPWA funds were distributed among different categories of housing needs consistent with the geographic distribution plans identified in its approved Strategic Plan.
 - c) Barriers or Trends Overview
 - i) Describe any barriers (including non-regulatory) encountered, actions in response to barriers, and recommendations for program improvement;
 - ii) Describe any expected trends facing the community in meeting the needs of persons with HIV/AIDS, and provide any other information important in providing services to persons with HIV/AIDS.
 - iii) Note any evaluations, studies, or other assessments of the HOPWA program available to the public.
 - d) Project Accomplishment Data:
 - i) Complete and submit CAPER Performance Chart 1 Planned Goals and Chart 2 Actual Performance;
 - ii) Complete and submit CAPER Performance Chart 3 for Housing Stability Outcomes, HOPWA Outcomes on Access to Care and Support in conjunction with HOPWA-funded Housing assistance, Monthly Household Income in conjunction with HOPWA-funded Housing Assistance, and

HOPWA Outcomes on Access to Care and Support not in conjunction with HOPWA-funded Housing Assistance.

OTHER NARRATIVE

Include any CAPER information that was not covered by narratives in any other section.

PY 07 CAPER Other Narrative response: